emotional reasons," Matthews said.

However, Matthews noted that some have benefited from the changes, among them some agencies "just below the top tier of mega-agencies," which are "delighted with the fallout of the conflicts caused by mega-mergers. They are delighted to find it easier to hire some of the talented people who either lost their jobs in merger activity or who elected to leave the battle to return to more traditional work places."

Matthews's concern, however, was that "all this negative publicity, all this squabble about conflicts, all this conversation about windfall profits and overnight millionaires has the potential to trickle down and affect our entire business. Some people feel that all this negativism has created a crisis in advertiser confidence in their agencies and that the marketing partnership, which has worked so well for the mutual benefit of agencies and advertisers alike, may be seriously threatened."

Among the other problems facing the agency business, Matthews said, is "the shrinking revenue base...[The] typical agency is facing severe pressure on the bottom line"; a loss of productivity in the past 25 years, and a "growing number of big advertisers [that are] fractionating their marketing efforts, by moving sizable dollars inside." Additionally, he said, while it has been estimated that in 1986 there was a 7.7% increase in advertising media growth, that percentage is less than that of other marketing expenditures, he said.

Another major problem cited by Matthews is "the crisis in advertiser confidence in agencies" and a diminished image of advertising agencies. Matthews said that he believes "that most of the agency mergers were or normally would be perceived among advertisers as evolutionary development matching the advertiser merger activity." But, he said, "the pace of the merger activity and the fact that a sizable number of U.S. agencies were sold to a 'foreign' agency group seemed to evoke an unusally violent reaction by U.S. advertisers."

Matthews said that "the bottom line is that many advertiser top management people view us in a less favorable light than, say, two years ago. We appear less responsible, less accountable, less business-like. We appear more money-oriented and less creative-oriented. We are less likely to be considered business-marketing-partners than we were two years ago." While solutions to the problems are difficult, Matthews said, "the way back to a more professional, credible relationship with our clients lies in responsible actions" and a reemphasis on creativity.

Creative ideas "give a company a brand new and fresh consideration in the consumer's mind...If you're truly looking for ideas which will inspire and move people to buy your company, your service, your products, then your greatest value is the full service agency," he said, adding: "But too many people have lost sight of this inalienable truth. We must find a way to win them back." □

NBC gets prime numbers in Arbitron February sweeps

NBC wins prime time daypart in majority of markets; CBS is second, ABC third;

NBC-TV continued its dominance in prime time in the Arbitron sweeps, based on results from 213 Arbitron markets provided to BROADCASTING by the ratings company for the February sweep period.

NBC affiliates won in 110 markets in prime time this time around. CBS came in first in 62 markets, and ABC won in 33 markets. There were eight ties for first place, six between NBC and CBS and two between NBC and ABC.

In the top 10 markets, NBC had outright wins in half of them: Boston, Detroit, Los Angeles, New York and San Francisco. It tied with CBS for first in Washington. CBS's only outright first-place finish in the top 10 came in Dallas. ABC placed first in Chicago, Houston and Philadelphia.

The following is a market-by-market presentation of daypart audience estimates for TV households in total survey areas during network prime time (Monday-Saturday, 8-11 p.m., and Sunday, 7-11 p.m., Eastern time). Numbers are in thousands (add 000). Boldface numbers indicate the market winner. A dash indicates no primary or secondary affiliation in the market. Not included are markets Arbitron does not measure, including those in Hawaii, Alaska and the U.S. Virgin Islands.

	1987 TSA households (000)		
ADI (rank)	ABC	CBS	NBC
Abilene-Sweetwater, Tex. (157)	18	20	**26**
Albany, Ga. (153)	4	—	**62**
Albany-Schenectady-Troy, N.Y. (51)	74	**91**	89
Albuquerque, N.M. (65)	73	48	**76**
Alexandria, La. (161)	6	—	**44**
Alexandria, Minn. (183)	—	**31**	—
Alpena, Mich. (212)	—	**6**	—
Amarillo, Tex. (117)	**40**	26	31
Ardmore-Ada, Okla. (174)	**22**	20	19
Atlanta (12)	195	203	**221**
Augusta, Ga. (99)	**51**	42	28
Austin, Tex. (72)	47	**59**	44
Bakersfield, Calif. (148)	20	23	**27**
Baltimore (21)	167	156	**202**
Bangor, Me. (154)	17	**26**	**26**
Baton Rouge (91)	**71**	64	44
Beaumont-Port Arthur, Tex. (122)	33	42	**52**
Bend, Ore. (208)	—	4	**5**
Billings-Hardin, Mont. (163)	17	**19**	11
Biloxi-Gulfport-Pascagoula, Miss. (179)	**38**	—	—
Binghamton, N.Y. (132)	12	**44**	19
Birmingham (Anniston), Ala. (43)	91	48	**127**
Bluefield-Beckley-Oak Hill, W.Va. (143)	23	—	**36**
Boise, Idaho (138)	24	21	**30**
Boston (6)	306	292	**355**
Bowling Green, Ky. (197)	**24**	—	—
Bristol, Va.-Kingsport, Johnson City, Tenn. (82)	22	46	**76**
Buffalo, N.Y. (36)	95	105	**119**
Burlington, Vt.-Plattsburgh, N.Y. (93)	16	**42**	41
Butte, Mont. (188)	8	**10**	8
Casper-Riverton, Wyo. (184)	7	7	**12**
Cedar Rapids-Waterloo-Dubuque, Iowa (75)	46	40	**55**
Charleston, S.C. (109)	37	45	**46**
Charleston-Huntington, W.Va. (47)	75	72	**123**
Charlotte, N.C. (32)	99	**144**	70
Charlottesville, Va. (196)	—	—	**8**
Chattanooga (80)	52	47	**70**
Cheyenne, Wyo.-Scottsbluff, Neb. (192)	—	12	**15**
Chicago (3)	**545**	387	520
Chico-Redding, Calif. (141)	**29**	20	12
Cincinnati (28)	102	132	**140**
Clarksburg-Weston, W.Va. (166)	—	**27**	23
Cleveland (11)	273	221	**287**
Colorado Springs-Pueblo (100)	**40**	36	38
Columbia, S.C. (88)	32	38	**89**
Columbia-Jefferson City, Mo. (142)	17	26	**31**
Columbus, Ga. (121)	**45**	38	18
Columbus, Ohio (34)	94	117	**129**
Columbus-Tupelo, Miss. (135)	10	30	**53**
Corpus Christi, Tex. (119)	**36**	27	30
Dallas-Fort Worth (8)	245	**253**	236
Davenport, Iowa-Rock Island-Moline, Ill. (74)	48	51	**69**
Dayton, Ohio (48)	68	**103**	81
Denver (19)	178	136	**183**
Des Moines (66)	50	**66**	64
Detroit (7)	274	247	**344**
Dothan, Ala. (160)	10	**39**	—
Duluth, Minn.-Superior, Wis. (120)	28	27	**31**
El Centro, Calif.-Yuma, Ariz. (182)	—	5	**11**
El Paso (105)	35	33	**45**
Elmira, N.Y. (165)	11	—	**17**